accenture

Memorandum

To: Anne Teresa, FSA

From: Howard Weitzner, Accenture

Date: November 29, 2002

Subject: Deliverable 95.2.1c Training Services Summary

Purpose
This memo summarizes the results of Training and Organizational Development Services provided to FSA University during the period October 1 – November 29, 2002. The results were delivered through detailed supporting materials and working sessions with FSA University staff. The work effort addressed improvements to FSA University's training services and organizational design.

Initiatives this Period
Specific initiatives addressed during this period included:
- FSA University strategic planning and organization development
- Training development team support
- 100 Series planning
- Cost analysis tool
- Performance consultant
- LMS support
- Performance Planning
- Learning Tracks

Planned Initiatives
During the period December 1 – December 31, 2002, the following initiatives may be addressed, but not limited to:
- FSA University strategic planning and organization development
- Training development team support
- 100 Series planning
- Cost analysis tool
- Performance consultant
- Resource planning
- LMS support
- Performance Planning
- Learning Tracks

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Description of Initiatives

FSA University strategic planning and organization development
Underlying several initiatives is ongoing support for FSA University's efforts to develop and enhance its organizational effectiveness. Activities continue to focus on aligning FSA University's activities with the strategic goals of the organization. FSAU action items will be mapped to FSA's overall performance plan. Activities this period continued to focus on defining FSAU's priorities for FY03, in light of budget constraints. Past observations and recommendations were reviewed with FSAU management and specific action items identified. Ongoing support for FSAU's Resource Planning initiative continues to be provided to further define and clarify the resource planning process and support the organization's need to maximize and report the utilization of staff time.

Training Development Team Support
The Training Development and Delivery team supports the creation and implementation of best practices for how FSA University develops and delivers training. The methodology (Plan, Design, Build, Deliver, Assess) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

Representatives of the Training Process Team serve as coaches to training development team leads. In this capacity, coaches assist team leads with project planning and management, creation of meeting agendas, and facilitation of team gatherings. Through this, coaches educate team leads on the training process itself, including both instructional design and project management elements.

FFEL / Direct Loan / Perkins training: FSAU is currently working out the logistics regarding the FFEL, Direct Loan, and Perkins loan programs. The team, led by Pennie Summers, will enhance interactivity on existing Direct Loan training materials for Debt Collection systems. Over the last several months' new stakeholders have been identified. With the increase in stakeholders, the scope is currently being revisited. Next month all parties involved plan to re-evaluate the details of the project. Once the details are determined the training development team will support the training effort.

100 Series Planning
The 100 Series team proceeded with the early phases of creating a standard approach for developing the schools training curriculum and schedule. The focus of this effort is to determine what courses comprise the "100 Series" and initiate their design, development, and scheduling.

During this period, the team focused on the following initiatives:
• Determining approaches to gather input from stakeholders, advisors, and schools

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- Identifying potential course catalog categories
- Initial stages of defining the "100 Series" content

Next steps for the 100 Series team include: gathering input from stakeholders and advisors, identifying the appropriate courses for the 100 Series, then determining basic design elements of each course (such as target audience, learning objectives, and high-level content). In the long term, each of these courses will be fully designed, developed, and delivered to schools.

Cost Analysis Tool
The cost analysis team has developed a Cost Analysis Tool (CAT) to facilitate the gathering and analysis of training cost data. This information will be used to reduce costs and optimize efficiency of future training teams. During this performance period, the team focused on the Phase 1 lessons learned, i.e. purpose, successes, challenges and potential next steps. The team concluded that Phase 1 of the CAT was successful and that a significant among of work and effort was put in to the development process. This month the team has been pulling together the most efficient and effective ways of gathering training data. Additionally, ad hoc support will continue to be provided as the FSA finance team uses the tool:

Activities during this period included:
- CAT team met to discuss the most efficient and effective ways to gather training data

Specific activities in the next period may include:
- Meet with FSAU managers to receive feedback on data gathering
- Begin design for phase 2 of the CAT
- Continue to introduce the CAT tool to training team leads, during the training team kick-off meetings

Performance Consultant
The Performance Consultant process is FSA University's service delivery model, through which FSA University supports the strategic priorities of the Channels and other Enterprise Units. During this period, the performance consultant team prepared and presented a transition document to prepare the new team lead, Dwayne Rumber, for his role. To enhance this transition, the team compiled to "toolkit" of materials most useful to performance consultants in their work. The team also supported the creation of briefing materials for Ann Manheimer, demonstrating how FSAU can assist the Department of Education create a similar Performance Consultant model.

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LMS Support
With the LMS operational, FSA University Services personnel have assumed responsibility for the day-to-day training and system administration. Ad-hoc support continues to be provided to FSA University as they operate the LMS. Specifically, during this period support has been provided to the LMS "Mad Dog" team and the LMS Navigation Assistance team. The Modernization Partner continues to interface between FSA University and the vendors (Jamcracker and Saba) as needed to facilitate resolution of issues. Specific activities this period included:
- Support for the rollout of the LaRS training for Financial Partners
- Assist with the planning of implementation of the Service Pack upgrade
- Prepare and facilitate a demonstration of Saba for the One-ED team including staff from TDC and HRG
- Create a briefing on Human Capital Solution Integration

Performance Planning
The "Line of Sight" or Performance Planning pilot was conducted with the University Services team. In this session, the Mod Partner team presented an overview of the Performance Planning effort and helped the University Services team create its own FY'03 action items to link to FSAU's Action Items and other key management documents. After applying some of the lessons learned in the pilot session, several other teams within FSAU conducted similar sessions to determine their teams' action items for the fiscal year. When team action items are collected, the next phase will include assisting managers with individual employee discussions along similar lines, identifying action items for team members.

Learning Tracks
Support for the Learning Tracks initiative is provided to assist FSAU identify and implement a process for developing capabilities within specific areas of the organization. During this period, the Case Management learning track initiative was supported through working sessions and process planning. Meeting Minutes document the results of these working sessions. Future support for the Case Management initiative will include recommendations of learning interventions and process enhancement. The overall approach adheres to a "Results First" Model that offers immediate benefits to both FSA and ED.

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Observations/Recommendations
During the period October 1 – November 29, the following observations were identified and will be reviewed to determine the potential impact and value for FSA University:
- Training development team members and CAT team members should integrate efforts when both teams can benefit from the same information, such as data gathering.
- FSA University should map its eight FY'03 action items to FSA's Performance Plan to indicate where FSAU could provide its greatest support to FSA.

Attachments:
- 100 Series
    - Existing offerings
    - Course categories
    - Needs assessment methods
    - "100 Series" briefing
- Performance Consultant
    - Table of Contents
    - Transition presentation
- LMS Support
    - Human Capital Solution Integration presentation
- Performance Planning
    - Performance planning presentation
- Learning Tracks
    - Meeting Minutes
- Observations/Recommendations
    - '01-'02 FSA U Observations/Recommendations